Support the Quick Implementation of PPM with Project Data

The main way that project managers can support your company in implementing strategic project portfolio management (PPM) is providing accurate and up to date information about your projects to be imported into Meisterplan. This will enable management to make better and faster decisions to ensure the success of your projects. The good news is that providing this project data will not require a lot of extra time and effort, because you only need to provide basic information about each project.

Project Data Check List

☐ Ask the Portfolio Coordinator:

- What file format should be used for the project data?
- What format should be used for dates (e.g., MM/DD/YY)?
- What unit should be used for employee workload (person days, hours or full-time equivalent (FTE)?

☐ Provide the following project data for each project:

- Project Name
- Project Start Date
- Project End Date
- Assigned resources and/or roles
- Current project status
- The expected workload for each assigned role and resource
- Any custom information as directed by the Portfolio Coordinator

Here is an example of how the information could be compiled in an Excel spreadsheet.

	A	B	C	D	E	F	G
1	ID	Project Name	Start	End	Status	Resource	Effort Required (FTE)
2	2019-A-1027	Anniversary Campaign	12.01.2020	04/30/2021	red	Sophie Davies	100
3						Noah Dawson	100
4						Tia Dixon	50
5	2019-A-1045	HR Software Implementation	11.01.2020	06/31/2021	green	Tim Seidel	80
6						Developer - Senior	160
7	2019-D-974	Agile Coaching Program	09.01.2020	02/28/2021		Consultant - Senior	120

Record any additional tasks here:

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Tips

> If you aren't sure how much capacity is needed for a project, give your best estimate, but be sure to let the Portfolio Coordinator know that it is just an estimate.

> If a project's start and end dates have not yet been decided, discuss with the Portfolio Coordinator what dates to use as this information is required in order to add a project in Meisterplan.